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ABSTRACT

This report examines the fate of general obligation (G.O.) bond measures in California from 1986 to 1999. For the entire 13-year period, the passage rate for local G.O. bonds averaged 54 percent. However, this average masks some dramatic variations depending on when the election was held, the district holding the election, and the area of California in which it was located. In 1990, California's school-facility problems were apparent, but a serious recession in the early 1990s had a dampening effect both on local district's willingness to go to voters for G.O. bonds and voters' willingness to approve them. Although the success of bond elections has varied by district type and size, in general, small elementary districts have done better at the polls and received approval for substantially more funding for facilities on a per-pupil basis. As a whole, elementary districts have been more successful at securing voter approval than unified districts and high-school districts. However, when it comes to amount per pupil, high-school districts received more money, reflecting, in part, the higher cost of high-school facilities. Furthermore, bond-election passage rates differed by county and region, and the causes behind success or failure remain open to question. (RJM)

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Local Bond Elections in California: Some Vital Statistics

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From 1986 through June 1999, 450 school districts in California sponsored a total of 731 general obligation (G.O.) bond measures asking their local communities to pay for public school facilities. Bonds allow districts to borrow funds for land and buildings, with the principal and interest to be repaid by local property owners through an increase in property taxes. Passage of these measures has required two-thirds voter approval, though a measure on the March 2000 ballot could change that to a simple majority.

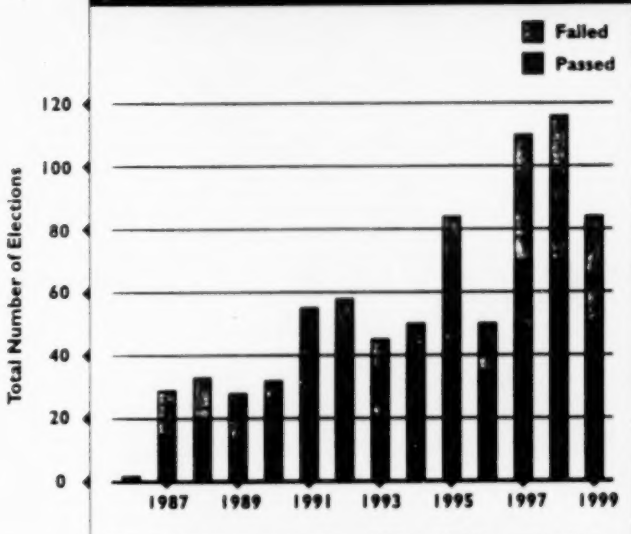
For the entire 13-year period, the passage rate for local G.O. bonds averaged 54%. This average masks some dramatic variations depending on when the election was held, the district holding the election, and the area of California in which it was located.

The economy plays a part in voter response

By 1990, California's school facility problems were becoming quite clear. A growing student population and technology advances were increasing schools' need to expand and upgrade their facilities. But a serious recession in the early 1990s appears to have had a dampening effect both on local districts' willingness to go to voters for G.O. bonds, and voters' willingness to approve them.

Since about 1995, the California economy has rebounded and many areas of the state have enjoyed tremendous prosperity. As Figure 1 shows, the number of bond elections attempted and the number passed both grew progressively through the second half of the decade.

Figure 1
The Success of G.O. Bond Elections has Fluctuated Along with California's Economy



During the recession years from 1990 to 1995, fewer than half of school district bond elections passed. The bars on the chart show the total number of elections divided into those that passed and those that failed.

Data: EdSource

EdSource 1/00

Success varies by type of school district

The success of bond elections has also varied by district type and size. In general, small elementary districts have done better at the polls and gotten approval for substantially more funding for facilities on a per-pupil basis. Conversely, large unified districts have been the least successful, have often had to attempt passage several times, and have settled for lower per-pupil amounts.

A look at the separate data by size and type of district further illuminates this trend. As Figure 2 shows, in terms of district size, the smaller the district the higher the bond passage rate. The smallest districts (those with fewer than 1,000 students) succeeded in 59% of their elections, while the largest districts (those with more than 20,000 students) had a 47% success rate. Perhaps surprisingly, the bond amount districts were asking for—at least when calculated on a per-student basis—appears to be a less significant obstacle to success than district size. In fact, the average amount per pupil in the smaller, more successful districts was $8,095. In the largest districts it was $3,857.

Elementary districts as a whole have also been more successful at securing voter approval of their bond measures. However, when it comes to amount per pupil,

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Figure 2
Variations in Bond-Election Success and Proceeds Correspond to District Characteristics

District size (number of students)	% of successful elections	Average bond proceeds per pupil (in districts where elections succeeded)
less than 1,000	59%	$8,095
1,000 to 4,999	58%	$7,177
5,000 to 9,999	50%	$5,103
10,000 to 19,999	48%	$3,913
more than 20,000	47%	$3,857

Type of district	% of successful elections	Average bond proceeds per pupil (in districts where elections succeeded)
Elementary districts	62%	$4,958
Unified districts	48%	$4,205
High school districts	51%	$7,247

Data: EdSource EdSource 1/00

In general, the urban areas of the state have passed more elections, particularly in Northern California. School districts in the San Francisco Bay Area have been the most successful. In Santa Clara County, for example, the passage rate for G.O. bond elections was 76%, and 31 measures were approved (through June 1999). In Sonoma County, 22 out of 26 elections passed. In Los Angeles County, the state's most populous county, school districts succeeded in passing 64% of the 72 measures they put before voters. Orange County is an exception. Only three elections were held in this county with more than 450,000 students in 27 school districts. Just two of those elections were successful.

In six California counties no bond elections have been attempted and in six more none has passed, despite the fact that the districts were small. These 12 counties are in remote areas with small student populations.

high school districts emerge on top with $7,247 per pupil. This reflects, at least in part, the higher cost of high school facilities. But it also raises questions about the relatively low average per-pupil amount of $4,205 in unified districts, despite the fact that these districts also must provide expensive high school facilities. It could indicate, for example, that unified districts have settled for fewer funds than they actually needed in order to gain voter approval.

Bond election passage rates differ by county and region

To at least some extent, the election attempts and success rates of local bond elections has varied by region—sometimes dramatically. Based on each county's total student population (in 1997–98), the highest amount is $8,778 per pupil in small, isolated Mono County. In centrally located San Joaquin County, on the other hand, residents have passed just one bond election, netting the county's schools $41 per pupil in local facility money.

Causes for success or failure are open to question

The history of bond elections in California is as varied as the state itself. It is clear that timing, school district size and configuration, and geography all play a part. But they do not tell the whole story of what determines success or failure of G.O. bond elections. The range in results evokes questions about both school district and community factors. What is it about small districts and elementary districts that enables them to be more successful? To what extent do public perceptions about the district itself—and its fiscal performance—make a difference in the vote? What effect does a community's wealth have on the passage of bonds and bond amounts? How important are the age of voters and the proportion of them with children in school?

School districts regularly grapple with these questions as they decide whether or not to hold a bond election in their communities.

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